



## **TAX ANALYST**

### **Purpose:**

To perform a variety of research and auditing duties involving the accounting, recording, and reporting of financial transactions involved in City taxes; to review financial records for accuracy; and to prepare financial reports, statements and special financial analyses; auditing work involving small private firms to determine compliance with established policies, procedures, provisions, and ordinances; to provide taxpayer assistance as requested; to identify, assess and recover property tax revenue; and to provide data preparation and analysis of revenue trends for the division.

### **Supervision received and exercised:**

Receives general supervision from the Tax Audit Supervisor or from other supervisory or management staff, and may exercise functional and technical supervision over clerical staff.

### **Examples of Duties:**

This class specification is intended to indicate the basic nature of positions allocated to the class and examples of typical duties that may be assigned. It does not imply that all positions within the class perform all of the duties listed, nor does it necessarily list all possible duties that may be assigned.

Duties may include, but are not limited to, the following:

- Compile Tax and License Division's monthly statistical reports for senior management and City Council; analyze and explain variances in revenues by tax type, industry segment, and special district; evaluate potential impact on future tax revenues.
- Retrieve and analyze meaningful information from the tax accounting system; perform analyses and studies identifying trends in historical tax revenues; design and implement ad-hoc reports; present results and analyses to management and Budgeting personnel for incorporation into City's budget forecasts.
- Perform varied office work relating to the administration of tax and license laws and ordinances; research and analyze the economic impacts of proposed tax legislation.

*Effective September 2001*

*Revised January 2006 (minimum qualifications)*

*Revised May 2006 (job title, duties, and MQs)*

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- Calculate and monitor the accrual of tax rebates in accordance with economic development agreements.
- Review amended returns and refunds to taxpayers for appropriateness under the Model City Tax Code; contact taxpayers to resolve questions and issues; compile documentation in support of refund requests and initiate refund transaction.
- Answer taxpayer questions and provide information to the public; assist with investigating taxpayer complaints and, when appropriate, recommend and/or initiate corrective action.
- Perform ad-hoc analyses of returns and reported taxpayer information to identify noncompliance and taxpayer errors in reporting; perform, as necessary, taxpayer follow-up and corrective action.
- Assist tax auditors in monitoring property tax information and property valuations; monitor and analyze County Assessor's records to ensure improvements, ownership changes, annexations, and exemptions are properly reflected in the tax rolls; compare rental and commercial property information to licensing information to identify unlicensed businesses; maintain database of rental property information.
- Participate in meetings, committees, and/or special projects as directed by management.
- Conduct limited special investigations and assist in more complicated special investigations as requested.
- Balance annual revenues to financial records.
- Identify and implement new or improved methods of recordkeeping for historical sales tax revenues.
- Prepare and present formal written reports of work.
- Perform related duties as assigned.

### **Experience and Training Guidelines:**

Any combination of experience and training that would likely provide the required knowledge and abilities is qualifying. The hiring department may include job related experience, training or license and certification preferences at the time of recruitment. A typical way to obtain the knowledge and abilities would be:

*Effective September 2001  
Revised January 2006 (minimum qualifications)  
Revised May 2006 (job title and MQs)*

CITY OF TEMPE  
Tax Analyst (continued)

**Experience:**

Six months of work experience involving financial research and/or reconciliation in one or more of the following areas: auditing, accounting, bookkeeping, budgeting, economics or another related field.

**Training:**

Equivalent to an Associate's degree from an accredited college or university with major course work in accounting, auditing, economics, or a related field.

**This position is included in the City's classified service, pursuant to City of Tempe Personnel Rules and Regulations, Rule 1, Section 103.**

**Job Code: 2041**

**FLSA: Exempt**